

United Way Kingston, Frontenac, Lennox & Addington
JOB DESCRIPTION

Job Title:	Coordinator, Gift Administration		
Reporting to:	Director Administration		
Job Classification	Level 2: Coordinator, Associate Range: \$40,231 - \$50,290		
Department:	Corporate Services		
Creation Date:	May 2022	Revision Date:	

SUMMARY

The Coordinator, Gift Administration (CGA) provides the administrative support to ensure an excellent donor experience for all donors, particularly Leaders of the Way, implementing plans so they are appropriately recognized, thanked and stewarded.

Working closely with the CEO, database and campaign teams, this position executes strategies to ensure donors in the community and in workplaces are stewarded. This position supports and tracks reporting processes for corporate and foundation donors.

Reporting to the Director Administration, the CGA implements stewardship plans and donor relationship models, administering processes related to stewardship of Leaders of the Way (LOTW) and Major Individual Gift (MIG) donors.

They provide logistical and administrative support to volunteer committees including coordinating committee meetings, drafting notes, supporting volunteers and staff on these committees.

DUTIES & RESPONSIBILITIES

Stewardship and Leadership giving (40%)

- Ensures donors are appropriately recognized, thanked, and stewarded
- Ensures all Leaders of the Way are appropriately stewarded and thanked, customizing as needed
- Supports volunteer committees, CEO and campaign staff on the cultivation, development and maintenance of long-term relationships between the donor and UW
- Customizes communication and stewardship plans for Leaders of the Way, based on their preferences and direction
- Supports Leadership & MIG committees and CEO to facilitate relationship building and stewardship
- Coordinates stewardship events, provides attendee lists and support at events to CEO

and volunteers

- Supports CEO, volunteers and staff on building relationships to maintain and grow Leadership donations (\$1200+) and major donors (\$5,000+)
- Works closely with CEO to implement stewardship plans to engage individuals through targeted affinity groups

Workplace Leadership Giving (15%)

- Works with staff in campaign on Leadership giving in workplaces, working with relationship managers to steward Friends and Leaders of the Way in workplaces
- Provides information related to Leadership giving to relationship managers, providing follow up and donor analysis for priority workplaces

Individual, Grants, Foundation Giving (15%)

- Ensures direct mail is timely, accurate and maximizes potential, growing donations through this channel
- Supports applications for grants, foundation, ensuring continuity and relationship building with corporation and foundation partners
- Supports the development of customized stewardship and reporting for workplaces with corporate social responsibility goals, working closely with workplace relationship managers as required
- Implements stewardship and relationship management plans to be implemented for foundations, business and community mail donors
- Works closely with Community Impact department and Resource Development department to support solicitation, communications and stewardship plans for prospects
- Supports prospecting of new business and individual giving
- Monitors annual work plans and identifies and troubleshoots issues that may arise in meeting goals and timelines

Data, Research and Analysis (10%)

- Implements established Donor Relationship model and stewardship strategies to reflect fundraising trends and best practices
- Supports and coordinates LOTW and MIG plans, and maintains strategic plans for key donors
- Works closely with database team to maintain accurate data, analysis and recording of information on prospects and donors
- Researches, collects information, and customizes profiles and reports for the timely solicitation and stewardship of donors, especially loyal Leaders and MIG donors
- Prepares research and background reports, sharing results with CEO and strategic volunteer relationship partners

Planned Giving (10%)

- Supports the planned giving program

- Maintains records of donors who have left bequests to the United Way
- Researches, identifies, cultivates and solicits Planned Giving prospects

Other Duties (10%)

- Other duties or tasks may be assigned based on the business needs of the organization

EDUCATION AND EXPERIENCE

Education:

- Certificate / diploma from community college

Experience:

- Minimum of two years' administrative experience providing excellent customer service internally and externally in a fast-paced office
- Proficiency in French is an asset

Skills & Abilities:

- Sound computer skills including spreadsheets, word processing, email / internet, database and / or customer relationship management and / or design software
- Well-developed analytical and reasoning skills (data analysis and evaluation)
- Ability to understand, express and apply concepts and instructions of a general nature as well as somewhat technical / scientific / administrative concepts, methods and procedures
- Ability to use moderately complicated formulae, tables and graphs
- Strong written, verbal, interpersonal and communication skills
- Proven time management skills and ability to effectively organize work in an environment with competing work duties
- Ability to work in a flexible office environment
- Must have attention to detail
- A committed team player who is also able to work in a self-directed manner
- Non-traditional hours may occasionally be required due to deadlines or operational issues
- Access to adequate transportation is a benefit

COMPLEXITY OF DECISIONS

Typical decisions include setting own priorities and taking actions in an effort to coordinate requests made by external sources.

This role coordinates requests from external sources to appropriate staff.

Judgement may require some interpretation of variables and the situation at hand.

Support and guidance for decision making is readily available.

MANAGEMENT / SUPERVISORY AND ADVISORY RESPONSIBILITY
<p><u>Direct Supervision:</u></p> <ul style="list-style-type: none"> ▪ There is no direct report for this position. <p><u>Indirect Supervision:</u></p> <ul style="list-style-type: none"> ▪ There are no indirect reports for this position.
TYPE OF SUPERVISION REQUIRED / INDEPENDENCE OF ACTION
<p>The Coordinator, Gift Administration operates with some independence of action and works under general supervision. Methods and procedures are available however questions dealing with unusual matters are referred to supervisor(s).</p>
CONSEQUENCE OF ERROR
<p>Typical errors may result in strained relationships with donors, events or initiatives that are not planned and coordinated effectively, etc. These errors are most often detected before they are implemented and most often result in lost time.</p> <p>More serious errors could result in adverse impacts on the UW KFLA's image and reputation.</p>
CONFIDENTIALITY
<p>This role is privy to confidential information related to activities of the organization and impacts within the community. Disclosure could have a moderate impact externally.</p>
CONTACTS
<p><u>Internal:</u></p> <ul style="list-style-type: none"> ▪ Management team, Staff ▪ Nature of the Contact – recommendations, approvals, collaboration, supporting initiatives <p><u>External:</u></p> <ul style="list-style-type: none"> ▪ Donors, Volunteers, Committees ▪ Nature of the Contact – relationship building liaison, information sharing, communications, negotiations, enquiries, etc.
PHYSICAL EFFORT
<ul style="list-style-type: none"> ▪ Majority of time is spent in a comfortable position with frequent opportunity to move about ▪ Infrequent need to move or lift articles
PHYSICAL SKILLS
<ul style="list-style-type: none"> ▪ Regular need to give close attention, hearing or seeing, to what is happening

- Requirement to work at a computer, keyboarding, etc. and various events, meetings, etc.

WORKING CONDITIONS

Physical:

- Located in a comfortable indoor area
- Regular exposure to factors causing moderate discomfort
- Slight possibility of accident or illness

Stress:

- Work and environment change very little over time
- Pronounced pressure from deadlines, production quotas, accuracy or similar demands
- Unpleasant social contacts and / or concern about unpleasant situations are probable

COMPETENCIES

The United Way Worldwide has developed an extensive Competency Model Framework. The Framework supports a common set of competencies to ensure that each United Way is able to attract, grow and retain the right people who have key competencies in areas that are fundamental to our mission and strategic direction.

Specific definitions, traits and behaviours are outlined the Framework titled: United Way Worldwide Competency Models. Those specific competencies that apply this this position are:

- Mission focused
- Relationship oriented
- Collaborator
- Results driven
- Brand steward